

**NOAA Personal Property
Status Meeting with Line Offices
July 28, 2005 at 11:00 a.m.**

Introduction

Ezekiel Dennison, Jr., Director of Logistics Division

Purpose

These meetings are being held monthly to ensure coordination among the Personal Property Branch, Finance Office, and the Line Office CFOs and/or representatives in the areas of:

- Property Balances
- Process and Procedures
- Inventory Status
- UPR Status
- Status of Projects

Agenda

The meeting covered the following topics:

- Status of Corrective Action Plans
- Audit Calendar
- Reports
 - Financial
 - Operational
- Matrix of Missing Documentation
- Property Managers
- Contact Information
- Unreconciled Procurements Report (UPR)
- Inventory
- Audit Issues
- Anticipated Projects
- Training
- Sunflower Update
- Heritage Assets
- Status of Tasks

Corrective Action Plans (CAPs)

The first topic of the meeting was the status of Corrective Action Plans (CAPs). CAPs are NOAA's response to findings or Management Letter Comments (MLCs) from the annual financial statement audit. CAPs detail the steps that NOAA will take to address the MLCs. Details for each CAP are provided in the back of the Line Office Operational Reports and are available on-line at the NOAA web site.

As a result of the FY 2004 financial statement audit, NOAA had seven MLCs related to Personal Property. NOAA has completed three of the seven CAPs and made continued progress on the remaining four CAPs. The seven MLCs are listed below:

- Management Letter Comment (MLC) #4 – Certification of Annual Inventory of Capitalized Property (Line Offices) – *completed*
- MLC #5 – Modify Sunflower to calculate depreciation correctly - *completed*
- MLC #6 – Ensure proper testing of modifications to Sunflower - *ongoing*
- MLC #7 – Timely submission of documentation to Property Office (Line Offices) - *ongoing*
- MLC #8 – Fill vacant supervisory positions within the Property Office – *selection process*. The Financial Support position will be advertised later. The Branch Chief, Jon Pinner, has been hired and began working this month.

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- MLC #9 – Monthly meetings between Personal Property, Finance Office, and CFOs and/or Line Office Representatives - *ongoing*
- MLC #17 – Compare Bills of Lading to items shipped (NLSC) – *completed*

Audit Calendar

The next topic of the meeting was the audit calendar, which can be located on the NOAA Personal Property's website at http://www.pps.noaa.gov/audit_calendar.html. The calendar details dates that are important in order to comply with the deadlines established by Finance. The calendar includes dates of when supporting documentation is due to Personal Property and when reports are due to Finance.

Additionally, on the 10th of every month supporting documentation is due to the Personal Property Office. **Reports of property transactions received after the 10th will not be included in Sunflower until the next month after the reports have been run.**

FY 2005 Audit

KPMG has begun examining third quarter data. They selected three different types of samples. One type tested the additions, deletions, and current and prior period adjustments made during FY 2005. Another type tested unreconciled transactions on the UPR. The final type tested the existence of assets. A handout was provided during the meeting that broke out the sample by Line/Staff Office.

Zeke Denison emphasized that the auditors are here, and NOAA needs to make sure to meet the auditors' needs and requirements. Special scrutiny should be given to ensure personal property accountability. Property custodians must follow appropriate procedures. KPMG can look at anything, even uncapitalized assets.

Per discussion with Anita Holley and Gilly Elsea, auditors completed Norfolk and Kansas City site work with no issues/findings noted. Brian Mason mentioned that KPMG is currently at Headquarters. As of the meeting, there were no Personal Property findings identified by the auditors.

Reports

The reports were the next topic of the meeting.

Financial Reports

Personal Property currently provides financial reports to the Finance Office on a monthly and quarterly basis. The monthly reports reflect the month's activity whereas the quarterly reports reflect year-to-date activity. These reports detail the capital assets of NOAA by major asset category (Aircraft, Ship, ASOS, NEXRAD, etc.). There is a summary of the acquisition cost that shows the beginning balance of the asset category and any prior period adjustments, any current period adjustments, any additions, and any deletions to arrive at the ending balance of the asset category. Also included in the reports are the details for the Unreconciled Procurements Report (UPR) and the details for the government furnished assets.

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The Financial reports for the month of July were provided to Finance electronically on July 21, 2005.

Operational Reports

The operational reports are similar to the financial reports; however, they detail only the assets for a particular Staff/Line Office. The Operational reports by Staff/Line Offices (S/LO) as of July 15, 2005, were provided in this meeting.

Several changes have been made to the operational reports this month. Information about each S/LO's Heritage Assets were provided in the report. Information about deferred maintenance was also included. In addition, to assist in a greater understanding of the reports, under each tab for the Sunflower reports, a key is provided that explains what each report consists of.

Break-out of OFA

We plan to break-out Office of Finance and Administration (OFA) to coincide with the new realignment along functional business lines as long as the new CAMS Organization Codes are established by that time. OFA will be broken out into:

- Acquisitions and Grants Office (AGO)
- Chief Administration Office (CAO)
- Chief Financial Office (CFO)
- Chief Information Office (CIO) - Not a part of OFA now – has separate org codes now. The OFA CIO currently in CAO will need to be broken out and moved to OCIO.
- General Counsel (GC)
- Program Analysis & Evaluation (PA&E)
- Workforce Management (WFM)

We are waiting for the Department Organization Order to be approved by the Department's Office of General Counsel. Once this happens, the Office of Workforce Management will be able to create the CBS Organization Codes that will be used to identify the new organizations to Sunflower. Three handouts were provided during the meeting relating to this topic – a letter from the Vice-Admiral on realignment, a fact sheet on the realignment process, and PAO and PC certifications which are used when establishing new PAOs and PCs.

The Date Comparison Report will be generated in the Workflow Information Tracking System (WITS). The software is currently being tested. WITS will also be able to report what is sitting in the Edit Interface Table for entry into Sunflower after a client has entered a new asset using the CD-50 web form.

Accumulated Depreciation Roll Forward Detail

The definition of depreciation is the systematic and rational allocation of the cost of the property, less its estimated salvage value over the estimated useful life of the property. The accumulated depreciation roll forward shows the activity by asset category for the fiscal year-to-date. It starts with the beginning balance, plus/minus prior period adjustments, plus FY05 depreciation, plus/minus current period adjustments, minus deletions, arriving at the ending balance.

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There are two types of adjustments: prior period and current period. Prior period adjustments are retroactive to when the asset was put into service and are usually adjustments for corrections of errors such as mathematical, oversight or misuse of information. Current period adjustments are effective in the period of the adjustment and future periods. Current period adjustments are usually a result of new events, acquiring more experience or obtaining additional information.

Depreciation expense is taken monthly on the 16th of each month. The amount of depreciation expense depends on the acquisition cost, useful life, and acquisition date of the asset.

The deletions column on the report represents the accumulated depreciation, including current period depreciation taken, on an asset removed from service.

Why is this information important? NOAA tracks costs for a project. Congress wants to know the costs required to conduct the various projects. Depreciation represents the distribution of the costs to acquire Capitalized Property over the useful life of the asset. NOAA reports those expenses to the project receiving the benefit of those material resources.

Matrix of Missing Documentation

NOAA Personal Property, with the help of Ernst & Young, reviews folders created to document capitalized assets. The Matrix of Missing Documentation presents the results of the review: identifying missing documentation, any errors or issues with the existing documentation, and any errors or issues with the record of the asset in Sunflower. This matrix is updated periodically and is posted on the personal property web site. Because these items are overdue and have been reported in prior reports, the CFO will be asked for help in resolving these issues,

The following S/LO have missing documentation due to the Property Office:

- NWS (2 barcodes):
 - Need to obtain a revised Lease Determination Worksheet based on actual acceptance of August for CD0001401604 (Air Quality Forecast System Augmentation Back-up (NCEP)). Coordinate with Procurement Office to revise the worksheet. -- OVERDUE
 - Missing invoices, receiving report, purchase order/contract, and depreciation accounting for CD0001459039 (STK Tape System) – Meeting held 7/27/05
- OAR (1 barcodes):
 - Missing receiving report for CD0001401841 (Content Management System) -- OVERDUE
- One item resolved
- Zero items added

Pertaining to the above items, Deborah Martin, OAR, stated that the required receiving report has been provided to Steve Bernstein three times.

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Per Brian Mason, a meeting was held with Dr. Baker about CD0001459039. He believes that the meeting resolved the missing items on this asset. Brian Mason also mentioned that the revision of the lease determination worksheet for CD0001401604 will be coordinated by himself, Heather Hirzel, and Procurement.

Incorrect Capitalized Inventory

During the review of folders, it was discovered that three assets contained incorrect capitalized inventories. These assets were acquired in April 2005 for the CIO; however, they were not put into Sunflower until June 2005. These assets were not included in the inventory printout; however, the property custodian should have added these assets to their inventory printout to notify Headquarters of the assets that are not in Sunflower. The property custodian for these three assets did not annotate the inventories to include these assets. If KPMG selected any of these assets for testing, this issue would most likely become a finding.

Property Managers

As part of the corrective action plan in response to MLC #7, each L/SO is required to appoint a property manager (PM) and an alternate. The L/SOs need to name the person formally, in writing. This person will be responsible for the coordination of all property management efforts for their L/SO, including:

- Ensuring that purchases of accountable property are reported within 10 days of acceptance;
- Assisting CWIP managers to ensure that capitalized property is reported as soon as possible after the asset is ready for use;
- Coordinating the annual/specialized physical inventories
- Assisting with the disposal of excess property; and
- Working with personnel within their Line Offices to resolve outstanding unreconciled payments appearing on the UPR.

The following personnel have been identified as principal Property Managers:

- Bernadette Foreman, NESDIS
- Jan Evans, NWS
- Robert Ziobro, NMFS
- George Ann Stansbury, NOS
- Jeanette McDonald, NMAO
- Judy Mickens, CAO
- Deborah Martin, OAR
- Janice Long, WFM
- Regina Jackson, GC
- Barbara Beasley, CFO
- George White, USAO
- Carol Christian, AGO

The CIO Property Manager position is still outstanding, although the hiring action is in place. The PA&E Property Manager is also outstanding.

The following offices have identified alternate Property Managers:

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- Rhonda Perry, NMFS
- Tim Daley, USAO
- Denise Tyler Littleford, AGO
- Mary Manoogian, OAR
- Cynthia Burley, CAO
- Brian Brown, NESDIS
- Millie Ingles, NMAO
- Michelle Masias, WFM

We are **missing alternates** for the following Line Offices:

- CFO
- GC
- NWS
- CIO
- NOS
- PA&E

Headquarters Contacts

Below is a list of the Line Offices with the associated Headquarters personnel who are assigned to address property issues related questions related to that Line Office:

- NOAA Research
 - Steven J. Bernstein
- NESDIS
 - Steven J. Bernstein
 - Holly E. Turri
- NOAA Weather & Climate
 - Holly E. Turri
 - Doreen A. Kaduri
- NOAA Ocean Service
 - Barbara Carson
- NOAA Fisheries
 - Dominic Blakey
- NOAA Finance & Admin.
 - Jennifer Foster
- NOAA Marine & Aviation Ops
 - Jennifer Foster
- Deputy Under Secretary
 - Jennifer Foster
- Heritage Assets
 - Lynette Joynes
- Inventory
 - Larry Oates
 - Ryland Pine
- UPR

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- Melissa Nelson
- Support
 - Paul Myers
 - Derek Jones
- Audit Leads
 - Brian Mason
 - Tom Deckard
- Norfolk
 - Anita Holley, Acting Branch Chief/PM
 - Robin MacMillan
- Boulder
 - Ron Jakaitis, Branch Chief
 - Rudy Nunez (RPM)
 - Sheila Hensley
- Kansas City
 - Anthony Harrison, Branch Chief
 - Gilly Elsea (RPM)
- Seattle
 - David Petre, Branch Chief
 - Elizabeth Valenzona (RPM)
 - Kim Hutchinson

UPR

NOAA has adopted the internal rule which states that object class codes beginning with 31 will be used only when acquiring accountable personal property. (See <http://www.pps.noaa.gov/acctobj.htm> for definitions of accountable property and object class codes.) Therefore, the assumption is that if a payment was made in the finance system using object class code 31, there should be a corresponding record in the property system. There are exceptions to this rule. (See <http://www.pps.noaa.gov/Training/UPR.htm> for the fact sheet on UPR.) If a LO cannot account for personal property, the LO must fill out a CD 52 to resolve outstanding items on the UPR.

Once a week, a file is captured out of CAMS of all payments against object class code 31 for items other than purchase cards. Purchase card payments are captured out of CAMS once a month. These files are sent to a server that adds these records to those previously existing UPR and displays them on the NOAA Personal Property Web Site. (<http://www.pps.noaa.gov>).

NOAA Personal Property was able to break-out the UPR by fiscal year, by line office, and by regions. Graphs were included in the Operation Reports illustrating the current status of the UPR for each Line Office by region. Other graphs illustrated progress made over that past few weeks on bringing the amount of unreconciled property down.

Per Brian Mason, the FY 2003 UPR as of the morning of the meeting was in the 10s of thousands.

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The FIMA UPR was presented. As of 7/25/05, significant progress has been made with UPR balances for Seattle down to \$27,566. Documentation for NMFS FIMA UPR (\$27,566) is coming but has not been received to date. Energies are now being directed towards the reduction of the FY 2003 and FY 2004 UPR.

Documentation referencing the UPR is to go back to the Regions. If you have problems getting the UPR worked, first contact your Line Office Representative, second contact your Regional Property Manager, and finally (if all else fails) contact Jon Pinner, Personal Property Branch Chief.

Recommendations to lower the UPR include: ensure that a CWIP code is used on appropriate projects, and timely submission of documentation to the Property Office. Additionally, encouraging clients to write the applicable barcodes on a copy of the UPR and submitting it to the Property Office will help lower UPR totals.

The object class code 315X should be used when buying items for non-NOAA entities; i.e., items that will not belong to NOAA. Such payments will be removed from the UPR immediately.

Inventory

There are a couple of types of inventory performed by NOAA. There is an Annual Physical Inventory. The primary purpose of a physical inventory is to determine if the Property Custodian/Asset Center Representative (PC/ACR) can account for all items of property on the Custodian's inventory list so the organization can reconcile the physical property with the property records and the financial records. The schedule for the physical inventories can be found at <http://www.pps.noaa.gov/invensch.htm>.

The status of first, second and third quarter annual inventories is as follows:

- Headquarters:
 - 3rd Quarter – NWS (2), NFMS (3), and USAO (12)
 - 1. NWS
 - a. 54202N039 – Francis, Stephen
 - b. 54201N040 – Masters, Robert
 - 2. USAO
 - a. 54034N000 – Lewis, Kathy
 - b. 54034N200 – Wildgoose, Jenell
 - c. 54034N300 – Miller, David
 - d. 54034N600 – Bryant, Ann
 - e. 54034N800 – Lewis, Kathy
 - f. 54036N100 – Williams, Monia
 - g. 54036N200 – Robertson, Donna
 - h. 540J0N100 – Turnbull, William
 - i. 540J0N200 – Schoenberger, Clifford
 - j. 540J0N210 – Kyler, John
 - k. 540J0N220 – Schoenberger, Clifford

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1. 540J0N300 – Vasvary, Rebecca
3. NMFS
 - a. 5430FN100 – Hayden, Brian
 - b. 5430BN401 – Heying, Kevin
 - c. 5430BN400 – Paterni, Mark
- Boulder:
 - All inventories completed
- Kansas City:
 - 1st Quarter – NMFS (1)
 1. NMFS
 - a. 54013C062 – Senn, David
- Norfolk:
 - 1st Quarter – NMFS (1)
 1. NMFS –
 - a. Gloucester, MA – Roundy, Glenn
- Seattle:
 - 1st quarter – GC (2)
 1. GC
 - a. Long Beach, CA
 - b. Juneau, Alaska
 - 3rd Quarter – OAR (3), OIG (1), and NWS (17)
 1. NWS
 - a. Western Region – 3
 - b. Alaska Region – 2
 - c. Pacific Region – 12
 2. OIG
 - a. Seattle OFC
 3. OAR
 - a. Las Vegas, NV
 - b. Seattle – requested an extension
 - c. La Jolla, CA

It was suggested that in order to decrease outstanding and/or late inventories, PMs should be notified of the inventories that went out each quarter and the status of those inventories and that PMs should follow-up on late inventories. Any extensions must be approved by the Property Manager. The status of each Line Offices' inventory was provided behind Tab 18 in the Operational Reports distributed at the meeting. NFA will be inventoried and separated in the future based on the new realignment.

Status of Capitalized Property Inventory

1. Headquarters: 26 delinquent (same as last month)
 - a. 5402FN000 – Anthony Fleming (Judy Mickens)
 - b. 5402FN100 – Barry Meyer
 - c. 54034N800 – Kathy Lewis
 - d. 540ION000 – Judy Mickens

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- e. 540ION200 – Alfred Corea
- f. 540ION300 – Stephanie Jones
- g. 540ION400 – Mack Cato
- h. 540IVN100 – Judy Mickens
- i. 540IVN200 – Don Still
- j. 540IVN210 – Vic Steward
- k. 540IVN211 – Jim Champion
- l. 540IVN300 – Roy Eckert
- m. 540IVN400 – Jonathon Randle
- n. 540J0N100 – Robert Kidwell
- o. 540J0N120 – Susan Kennedy
- p. 540J0N220 – Clifford Schoenberger
- q. 54206N02S – Richard Petersen
- r. 54226N010 – Wayman Baker
- s. 5430BN400 – Sheri Hogan
- t. 5430BN401 – Kevin Heying
- u. 5430BN411 – Mark Paterni
- v. 54507N000 – Savitrie Thomson
- w. 54036N100 – Kimberly Clark
- x. 54036N200 – Kimberly Clark
- y. 540IVN230 – Debra Pickerign
- z. 5430AN200 – Thomas Meyer
- 2. Boulder
 - a. 54001M012 – Boulder Acquisitions Division (AGO)
 - b. 54001M011 – Boulder Systems Division (CIO)
 - c. 54001M008 – Boulder Library (CIO)
 - d. 54001M009 – Boulder Finance Division (Finance)
 - e. 54001M004 – Boulder Storeroom (Logistics)
 - f. 54001M006 – Boulder Warehouse (Logistics)
 - g. 54001M007 – Boulder Publications/Personal Property (Logistics)
 - h. 54001M002 – Boulder WFM Division (WFM)
- 3. Kansas City:
 - a. 54002C013 and 54002C190
- 4. Norfolk:
 - a. Norfolk
 - i. 54019E132 – vacant
 - ii. 54019E135 – Jack Salmon
 - b. NMFS
 - i. Highlands, NJ – 54028E119 – Robert Reid
 - ii. Washington, DC – 54028E122 – Michael Vecchione
 - iii. Gloucester, MA – 54032E124 – Sandra Arvilla
 - iv. Gloucester, MA – 54054E154 – Nancy Berube
 - c. NMAO
 - i. Honolulu, HI – 54034E197 – Jon Rix
- 5. Seattle

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- a. NMAO
 - i. 54001W051 – Operations Division (NMAO Pacific)
 - ii. 54001W305 – Honolulu Port Office (NMAO Pacific)
 - iii. 54001W054 – Marine Engineering Division (NMAO Pacific)
 - iv. 54001W055 – Mission Support (NMAO Pacific)
 - v. 54001W053 – McArthur II (vessel)
 - vi. 54001W068 – Rainier (vessel)
 - vii. 54001W057 – Hi'alakai (vessel)
- b. OAR
 - i. 54030W282 – La Jolla, CA (Steven Cook)
 - ii. 54035W287 – Las Vegas, NV (Karen Balecha)

Audit Issues

Listed below are the capitalized assets that NOAA Personal Property believes have been acquired; however, all the required supporting documentation **has not been provided**:

1. Strategic Acquisition Management Software – AGO currently in use
 - o Incomplete documentation received.
2. Grants on Line – AGO/CIO – June 2005
 - o Incomplete documentation received.
3. IJPS (Initial Joint Polar System) NOC/Communications – NESDIS – *Changed to 2007*
4. NPOESS (National Polar-Orbiting Operational Environmental Satellite) – NESDIS (new)
 - o Awaiting Air Force draft agreement, with an unknown ETA
5. Thomas Jefferson Modification – NMAO – July 9, 2005 (**new**)
6. Hydrographic Survey Launches – NMAO – June 2005 (**new**)
7. eJet SuperComputer Upgrade – OAR (Boulder) – February 2005
8. Two items resolved since June
9. Three items added since June

R.J. Dominic, Finance, asked if the Bigelow, a ship launched in June according the Admiral newsletter, was accounted for in Sunflower.

NOAA Personal Property needs the Line Offices' help to identify any other future transactions related to property so that we can be proactive in accounting for those assets.

Upcoming Projects

In addition to the above-mentioned assets, below are assets that are expected to be acquired during this fiscal year. NOAA Personal Property needs the help of the Line and Staff Offices and their Property Managers to provide us with some information about these assets.

- GOES Data Archive – NESDIS
 - November 2005
 - Part of the CLASS project, which is capitalized at major steps; the next major step is November 2005, during which it may be capitalized

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- Bernee Foreman will research whether the Data Archive will be part of the next major step or not
- GOES N (Satellite) – NESDIS
 - Delayed, at this time the date is unknown.
- NOAA N/18 (Satellite) – NESDIS
 - Launched May 20, 2005 but has not yet been accepted.
- Software for Advanced Front End Processors – NESDIS
 - Expected acceptance date is the second week in August
- NSOF (NOAA Satellite Operations Facilities) Network Core (Data Communications Network for the move to the new Suitland building) – NESDIS
 - September 2005
- SOCC Workstations – NESDIS
 - September 2005 (Not until the move)
- SARSAT Upgrade – NESDIS
 - New date scheduled for second quarter 2006
- Law Enforcement Records Mgmt Software – NMFS
 - October 2005
- Autonomous Underwater Vehicle (AUV) – NMFS
 - November 2005
- McArthur II / Nancy Foster / Oscar Sette – NMAO
 - September 2005
- McArthur (Vessel) transfer to Marshall Is. – NMAO
 - Waiting on Congress
- Aircraft Regulatory & Safety Upgrades – NMAO
 - September 2005
- TurboCDR (Aircraft) – NMAO
 - Begin disposal process in Summer 2005. Has been reported to GSA.
- ADCAT Software for NGS for Geodetic Surveys– NOS
 - September 2005
- ORDA (Open-source Radar Data Acquisition) – NWS
 - September 2005

If there is any other procurement forecasted to occur, please provide NOAA Personal Property with information to help facilitate the accounting of that property.

Training

The PAO training is on e-Learning and will be active on or about 22 August. A link will be placed on the Personal Property website that will take the user directly to e-Learning.noaa.gov. The user must have an e-Learning login to access the training and test. Upon successful completion of the course and a passing grade (80% or better) on the test, a certificate will be issued. Personal Property is currently checking to determine if CEU credit can be earned for the training. Property Custodian training has been delayed until the upgrade to Sunflower was completed and will be available soon.

Line and Staff Offices should include the expense for training in future budgets.

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Sunflower Update

Version 3.8 of Sunflower has been completed.

The schedule for implementation of the new version of Sunflower is as follows:

- Roll-out: Completed
- Receive CD-ROM: Completed
- Identification of changes: Completed
- Testing Version 3.8: Completed
- Implementation: Completed July 11, 2005

The CD-50 forms now reflect the new terminology.

Heritage Assets

A copy of the Heritage Asset Photo Catalog was published on the Property web site at the following link: www.pps.noaa.gov/Heritage/index0001.html. We encourage photos to be submitted for inclusion on the web. Additionally, please provide detailed descriptions of each asset (i.e. height, weight, dimensions, etc.). If no photo is received, the asset will not be included in the catalog. In addition, please review the assets in the catalog to verify the history and description. NOAA is encouraged to work with the Presidential directive and "Preserve America" initiative for the preservation and display of all Heritage Assets. This is intended to help underdeveloped areas of the U.S.

New guidance has been issued regarding Heritage Assets. FASAB 29, which replaces previous guidance is effective for reporting periods after September 30, 2005; NOAA will be implementing the guidance early.

Status of Tasks

A review of tasks completed, tasks in progress, and tasks to be completed in the future was provided.

All July financial reports and operational reports have been completed. The Personal Property Branch Chief, Jon Pinner, was hired. The upgrade to Sunflower 3.8 was completed. The following programmed improvements to Sunflower have also been completed: year-to-date lease schedule. Several revisions to Operational Reports were implemented. The following recommendations were implemented at the Regions – centralized cataloging and Seattle clean-up effort.

Tasks underway include following-up with Line Offices and Property Managers on issues identified during the above property folder review (Matrix of Missing documentation). Additionally, we are continuing improvements to monthly and quarterly reports; based on feedback, the necessary revisions are being made. Also, some of the Line and Staff offices need to provide names of alternates to the designated Property Managers.

Execution of PC training is underway. Hiring action for the Financial Accountant is in process.

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Sunflower improvements still in progress include:

- Revisions (formatting changes) to existing monthly and quarterly reports
- Continue to work on the schedule of projects
- For all the above program improvements:
 - Develop test plan
 - Test program
 - Test results

Finally, recommendations are being made for improvements to business processes as the result of site visits to the regional offices. A composite of all site visits has been completed by Heather Hirzel for review. In addition, Policy and Procedures Manuals are currently in the process of being developed. **The Personal Property Branch will start their phone campaign and visit with all Line Offices Property Managers to address all outstanding issues.** All contacts status will be recorded and presented at next meeting.

Tasks to be completed include the following:

- Automation of the reconciliation of UPR
- Monthly mini audits focusing on
 - Review of property folders
 - Review and analyze monthly and quarterly reports
- Submission of Reports
 - Deputy Undersecretary (Jack Kelly)
 - Finance
 - Line Offices

Agenda Items for Next Meeting

If there are agenda items that the staff/line offices would like addressed in these monthly meetings, please provide them to Personal Property. You may email your suggestions to brian.g.mason@noaa.gov.

Comments and Questions

RJ brought up the audit issues. He wants to have them resolved by the end of August.

Attendees

Judy Mickens - CAO
Dalena White – CIO
Richard Sylvester – DOC/OS/IMD
Lalit Bajaj – DOC/OS/IMD
R.J. Dominic - FIN
Marjorie Sams – GC
Bernee Forman – NESDIS
Brian Brown – NESDIS
Bob Ziobro – NMFS
Rhonda Perry - NMFS

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Mary Manoogian – OAR
Deborah Martin – OAR
Sarmah Sarnor – OCIO-HPCC
Janice Long - WFM
Zeke Dennison – CAO/Logistics
Jon Pinner - PPB
Derek Jones – PPB
Brian Mason – PPB
Don Still – Logistics Division
Tom Deckard – PPB
Lyn Joynes – PPB
Glenn Davis – BranCore Technologies
Paul Myers – BranCore Technologies
Heather Hirzel – Ernst & Young
Andrea Hernandez – Ernst & Young

Gilly Elsea – Tele-Conference-Kansas
Sheila Hensley – Tele-Conference-Boulder
Anita Holley – Tele-Conference-Norfolk
Kim Hutchinson – Tele-Conference--Seattle
Robin MacMillan – Tele-Conference-Norfolk
Rudy Nunez – Tele-Conference-Boulder
Elizabeth Valenzona – Tele-Conference-Seattle

Date and Time of Next Meeting

The next meeting is tentatively scheduled for Thursday August 25 @ 11 a.m. at SSMC 4, Room 8150.